

EXAMINING THE LGBTQ+ MARKET FOR A FLORIDA KEYS
AND KEY WEST VACATION
EXECUTIVE SUMMARY



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July 2023

OVERVIEW

The Monroe County Tourist Development Council (TDC) is charged with promoting tourism to the Florida Keys and Key West. This study was conducted by Tourvey in cooperation with the TDC research department. The primary goal of this research was to examine the intentions, perceptions, and behaviors of the LGBTQ+ market for a Florida Keys and Key West vacation for the Keys' top feeder markets with the purpose of developing potential target markets. A secondary goal was to examine differences between respondents who identify as being LGBTQ+ and those who identify as straight as they relate to each of the below objectives.

The major objectives of this study were:

1. To determine the specific brand perceptions (both unaided and aided) the LGBTQ+ community has of Monroe County,
2. To determine the visit intentions that LGBTQ+ members have for Monroe County (used synonymously with Florida Keys hereafter),
3. To determine which of the primary attributes (products) of Monroe County are enticing to the LGBTQ+ community.
4. To create an Importance-Performance grid (using the attributes in #3 above) by graphing the perceived strengths and weaknesses of a Monroe County vacation based on how important these attributes are to the LGBTQ+ community in comparison to how they perceive Monroe County is performing them.
5. To determine differences in perceptions of a Monroe County vacation for members of the LGBTQ+ community based on where they live.
 - a. This will be mapped for both "hot-spots" and "cold-spots" using GIS as well as differences between those who have and have not visited Monroe County.
6. To determine what the LGBTQ+ community would want in a vacation to Monroe County that they don't believe Monroe County currently offers (completed in the qualitative study).
7. To determine the best mediums to use for attracting the LGBTQ+ community to Monroe County.
8. To understand how Monroe County can best use social media as a marketing tool to entice the LGBTQ+ community.
9. To determine the value that the LGBTQ+ community perceives of a Monroe County vacation, and how these perceptions are related to their visit intentions.

10. To determine the decision-making process that LGBTQ+ members go through when planning a vacation (completed in the qualitative study),
11. To determine specific target markets of LGBTQ+ members that Monroe County should pursue, as well as detailed profiles and preferences of each segment.
12. To determine best overall strategies for the marketing and promoting Monroe County to the LGBTQ+ community.

EXECUTIVE SUMMARY

- LGBTQ+ respondents are younger and had just slightly lower incomes than straight respondents. Yet, they have found the means to travel more frequently and to more destinations than straight respondents. This suggests that the current, young LGBTQ+ market will continue to grow over time.
- LGBTQ+ respondents were found to be more likely to travel with friends and have more people in their hotel rooms yet were found to be less likely to travel with a significant other than straight respondents. Hence, marketing hotel rooms with suites and/or multiple beds would likely resonate with them.

Unaided, straight respondents were slightly more aware of the Florida Keys as a vacation destination than straight respondents, while almost no difference was found in their aided awareness. This suggests that marketing campaigns that work on building awareness of the Florida Keys as a vacation destination might be needed to increase potential market share.

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- While slightly fewer LGBTQ+ respondents have been to the Florida Keys than straight respondents, they have taken more overall trips and are just as likely to visit the Florida Keys in the future. The lower percentage of having visited is likely due to this group being younger and suggests the LGBTQ+ market has strong future potential.
- The overall perceived image of the Florida Keys as a vacation destination was lower for LGBTQ+ respondents than for straight respondents. Additionally, LGBTQ+ respondents were less likely to spread positive word-of-mouth advertising than straight respondents. Both findings suggest that the negative items found in the qualitative portion of the study are somewhat problematic to members of the LGBTQ+ community. In particular, the perceived politics of the state was a deterrent to many respondents. Changing these perceptions would likely increase this market's desire to travel to the Florida Keys.
 - It should also be noted that only 15% of the LGBTQ+ respondents rated the Florida Keys as "unwelcoming." Also, it is possible that LGBTQ+ travelers view more destinations as "unwelcoming" than straight travelers, suggesting the identified problems might not be specific to Florida or the Keys.
- Straight and LGBTQ+ respondents' top information sources used when traveling were very similar. With Google, and the destination's website being the top two sources, findings suggest that investing in the website and search engine optimization (SEO) are important for attracting both markets.
 - LGBTQ+ respondents were statistically more likely to use TikTok, Snapchat, Instagram, and Twitter than straight respondents when planning travel. This

suggests that investing in social media could be key in gaining LGBTQ+ market share.

- LGBTQ+ respondents were also statistically more likely than straight respondents to use a social media influencer to inspire their travel planning. Additionally, the most important traits that LGBTQ+ respondents were found to desire in an influencer were: a) how competent they believed they are, b) whether they seem down to earth, c) whether they like them, and d) how much they trust them. Pro-LGBTQ+ social media influencers, with these qualities, should be sought out to help promote the Florida Keys as a vacation destination.
- While straight and LGBTQ+ respondents ranked the most important attributes that the Florida Keys could offer similarly, LGBTQ+ respondents rated LGBTQ+ vacations, nightlife/Duval Street, underwater ocean life, paddle boarding, cultural places, scuba/snorkeling, and nature/animal life statistically higher than straight respondents. These attributes should be utilized more in LGBTQ+ advertising, while warm/sunny weather should be used more in advertising targeting straight respondents.
- Straight and LGBTQ+ respondents rated their perceived performance of almost all the above attributes quite similarly. LGBTQ+ respondents rated LGBTQ+ vacations statistically higher than straight respondents. Straight respondents felt the Florida Keys would perform better at historic attractions, cultural places, and relaxing vacations than LGBTQ+ respondents. These differences should be noted when developing communication to these markets.
- Placing the above scores for importance and performance on an important-performance grid of LGBTQ+ respondents revealed the following:
 - Areas to keep up the good work (important and you are doing well): relaxing, local food, sunsets, beaches, open blue water, warm/sunny weather, nature/animal life, family vacations, and nightlife/Duval Street.
 - These are areas where current marketing efforts are being perceived as doing well on areas that are deemed important by the LGBTQ+ market.
 - Areas to concentrate on (more important than you are performing): uncrowded places, LGBTQ+ vacations, cultural places, and historical places.
 - These attributes should be highlighted in communication efforts targeting LGBTQ+ visitors in hopes of increasing perceptions.
 - Possible overkill (areas you are performing better than desired): romantic vacations (almost “keep up the good work”), underwater ocean life and scuba/snorkeling.

- These are attributes the LGBTQ+ market believe you are good at, but that are not important to them. Marketing materials likely do not need to highlight these areas.
- Lower priority with potential (niche activities): local characters, paddle boarding, kayaking, fishing, destination weddings.
 - These attributes would likely only work well in specifically targeted messages to these smaller, niche types of experiences.
- Exploratory factor analysis (EFA) of the importance attributes identified four distinct factors based off the 21 attributes examined. Each of the four resultant factors represents a group of items/activities that were rated extremely similarly by each independent respondent and suggests attributes that would be good to market together. Hence, targeted marketing for these four types of visits should combine these attributes. The four resultant factors and the importance items that each include were:
 - OUTDOOR ACTIVITIES: Kayaking, scuba/snorkeling, paddle boarding, fishing, destination weddings, romantic locations, local characters.
 - SCENERY: Beaches, warm/sunny weather, relaxing, open blue water, sunsets, underwater ocean life
 - CULTURE: Historic attractions, cultural places, family vacations, nature/animal life, uncrowded places,
 - NIGHTLIFE: LGBTQ+ vacations, nightlife/Duval Street, local food
- Placing the importance factors from the EFA (what LGBTQ+ respondents desire in a vacation) in a cluster analysis, revealed 4 potential, distinct LGBT+ markets. The four markets, in expected order of how good they would be, are listed below with recommendations for each.

Activity-Alls (n = 153): Really love outdoor activities

- This group should be a primary target market. They are the second largest group with moderately high incomes. More importantly, they have the best image of the Florida Keys, have visited the most, and plan on visiting the most in the future. Also, they believe a trip to the Florida Keys is a good value.

- Marketing to this group should focus on the outdoor activities the Keys have to offer as well as the local culture. Yet, this market will likely be attracted to all marketing messages based on the Florida Keys' attributes.

Scenery-Nightlifers (n = 137): *Love Scenery and nightlife*

- While this is a slightly smaller market, with lower incomes, they have a very good image of the Florida Keys and have a good likelihood of visiting in the future, even though they have previously visited slightly less than the other groups.
- Marketing to this target market should focus on the scenery related to the Florida Keys, local culinary experiences as well as the offerings of Duval Street and nightlife.

Cultureds (n = 169): *Travel for culture*

- This is the largest and oldest market, though they have low incomes and plan on having the fewest visits in the next two years. Also problematic is that they rate the value they would expect to receive from a visit to the Florida Keys the lowest.
- Attracting this market will likely be difficult and should not be a priority. Messages that focus on the culture and history of the Florida Keys would be most likely to entice this market.

Dislikers (n =108): *Not a fan of most of what the Florida Keys offers*

- This is the smallest and youngest potential market. They have the worst image of the Florida Keys as a vacation destination yet have previously visited the second most and plan on visiting in the next two years the second most.
- Creating targeted marketing for this group will be very challenging. They dislike much of what the Florida Keys offer, though they somewhat like the outdoor activities the Keys offer.

- In conclusion, the results suggest that the Florida Keys could have competitive advantage over other destinations in attracting LGBTQ+ visitors if it were to highlight their outdoor activities, scenery, culture, and nightlife. They should focus marketing efforts on Activity-Alls and Scenery-Nightlifers. They should do this by targeting these

groups with the attributes each finds most important while concentrating marketing efforts on their website, SEO, and social/mobile media outlets.

**A copy of this study in its entirety can be made available on request.*